A9500-1U

Alphabetical Order

ESTIMATE OF ANNUAL REFERENCES FOR SPECIFIC PRODUCTS & SERVICES

The following report provides the key findings from the 1988-89 National Yellow Pages Usage Study. Based on two years of measurement (96 measurement weeks during January through December each year), a total of 21,715 telephone interviews were conducted among a random sampling of persons age 18 and over residing in telephone households in the continental United States. Following are the research estimates of Yellow Pages references for specific products and services.

Product/Service Category	Estimate of Annual References	
	Estimate (in millions)	Rank
Air Conditioning Contractors	9	105
Air Conditioning Systems	45	83
Air Conditioning System Repairs	24	99
Airlines	224	20
Appliances - Major	99	48
Appliances - Major - Repair	102	46
Attorneys/Lawyers	272	12
Automotive		
Auto Accessories	98	27
Autos/Auto Dealers	434	6
Auto Body Repairing & Painting	69	68
Auto Parts New & Used	828	3
Auto Renting & Leasing	129	40
Auto Repair/Service	514	5
Auto Wrecking & Towing	96	52
Mufflers & Exhaust Systems	30	97
Service Stations - Gas & Oil	99	48
Transmissions	36	89
Banks	239	16
Beauty Salons	263	13
Books/Gift Shops/Novelties & Toys	158	30
Building Materials	275	11
Carpeting & Other Floor Covering	78	64
Carpet & Rug Cleaning	69	68
Churches/Clergy	90	55
Cleaners/Tailors	81	60
Clothing		
Men's, Women's, Children's Wear	93	53
Shoes	45	83
Contractors		
Electric Contractors	54	78
General Contractors, Home Builders, Home Improvements	81	60
Plumbing Contractors	230	18
Roofing Contractors	33	91
Other Contractors (masons, cabinetmakers, painters, etc.)	230	18
Dentists	197	22
Department Stores	254	14
Electrical Supplies & Equipment	51	79
Electronic Products		
Computers/Computer Dealers	81	60
Telephone Equipment & Systems	15	101
Televisions, Radios, VCRs, etc.	99	48
Typewriters	3	107
Electronic Products - Repair		
Repair/Parts for Television & Radio	75	65
Repair/Parts - Other Electronic Products	87	56
Equipment & Supplies for Retail Business	39	87
Exterminators/Pest Control	51	79
Farm Equipment & Supplies	75	65

ESTIMATE OF ANNUAL REFERENCES FOR SPECIFIC PRODUCTS & SERVICES (Cont'd)

Product/Service Category	Estimate of Annual References	
	Estimate (in millions)	Rank
Florist/Nurseries		
Florists/Flowers	182	27
Nurseries/Greenhouses	63	74
Furniture	155	31
Glass	99	48
Government & Essential Services	317	8
Grocers, Supermarkets, Bakers, etc.	290	10
Hardware Stores/Hardware	197	22
Heating Contractors	9	105
Heating Systems	45	83
Heating System Repair	12	103
Hobbies & Crafts	185	25
Home Furnishings	144	35
Hospitals/Nursing Homes		
Hospitals	311	9
Nursing Homes	21	100
Hotels/Motels	188	24
Industrial Equipment & Supplies	84	58
Insurance	353	7
Jewelers/Watches	42	86
Lawn & Garden Products		
Lawn Mowers, Snowblowers, Edgers & Other Power Tools	39	87
Other (fertilizer, sprinklers, seeds, etc.)	51	79
Lawn & Garden Services		
Landscape Contractors	69	68
Lawn Maintenance	69	68
Loans, Financing & Mortgages	51	79
Locks, Locksmiths, Security Systems	66	73
Lumber, Lumber Yards	161	29
Machines, Motors & Engines	69	68
Media/Publishing (cable TV, radio & TV stations newspapers, etc.)	135	36
Morticians, Funeral Directors	33	91
Moving & Storage	60	76
Office Furniture, Equipment & Supplies	87	56
Oil, Gas & Other Utilities	146	34
Optometrists, Opticians, Eyeglasses	123	41
Paint, & Other Wall Coverings	81	60
Pets/Animal Care		
Pet Shops, Supplies & Food	84	58
Veterinarians	155	31
Pharmacies	135	36
Photography Related		
Photographic Equipment & Supplies	72	67
Photographers - Portrait	36	89
Photo Finishing & Processing	33	91
Physicians/Medical		
Physicians & Surgeons	1,100	1
Other (clinics, audiologists, nurses, radiology, etc.)	164	28
Pizza	532	4
Plastic, Rubber & Petroleum Related	60	76
Plumbing Fixtures & Supplies	33	91
Printers, Copying, Screen Printing, etc.	120	42
Professionals & Other Specialists (accountants, architects engineers, etc.)	132	38

ESTIMATE OF ANNUAL REFERENCES FOR SPECIFIC PRODUCTS & SERVICES (Cont'd)

Product/Service Category	Estimate of Annual References	
	Estimate (in millions)	Rank
Real Estate	215	21
Records/Videotape - Sales & Rentals	105	45
Recreational Vehicles		
Motorcycles, Scooters	33	91
Campers, RVs, Snowmobiles, etc.	12	103
Recreation & Entertainment		
Theaters/Movies	111	44
Other (bowling, marinas, golf courses, etc.)	242	15
Rentals - Other/Rental Stores	114	43
Restaurants		
Fast Food	155	31
Other	871	2
Schools, Instruction, Tutoring	236	17
Social Service Organizations	63	74
Sporting Goods	185	25
Tires/Tire Dealers	132	38
Transportation/Travel		
Bus Lines	33	91
Railroads	15	101
Taxis, Limousines	93	53
Travel Agents	102	46

SOURCE: STATISTICAL RESEARCH, INC.

Rank Order

ESTIMATE OF ANNUAL REFERENCES FOR SPECIFIC PRODUCTS & SERVICES

The following report provides key findings from the 1988-89 National Yellow Pages Usage Study. Based on two years of measurement (96 measurement weeks during January through December each year), a total of 21,715 interviews were conducted among a random sampling of persons age 18 and over residing in telephone households in the continental U.S. Following are the research estimates of Yellow Pages references specific products and services.

Product/Service Category	Estimate of Annual References: Estimate (in millions)	Estimate of Annual References: Rank
Physicians & Surgeons	1100	1
Restaurants Other than Fast Food	871	2
Automotive-Auto Parts New & Used	828	3
Pizza	532	4
Automotive-Auto Repair/Service	514	5
Automotive-Autos/Auto Dealers	434	6
Insurance	353	7
Government & Essential Services	317	8
Hospitals	311	9
Grocers, Supermarkets, Bakers, etc.	290	10
Building Materials	275	11
Attorneys/Lawyers	272	12
Beauty Salons	263	13
Department Stores	254	14
Recreation & Entertainment Other than Theatres/Movies	242	15
Banks	239	16
Schools, Instruction, Tutoring	236	17
Plumbing Contractors	230	18
Contractors Other than Electricians, Home Builders, Plumbers & Roofers	230	18
Airlines	224	20
Real Estate	215	21
Dentists	197	22
Hardware Stores/Hardware	197	22
Hotels/Motels	188	24
Sporting Goods	185	25
Hobbies & Crafts	185	25
Florists/Flowers	182	27
Physicians/Medical Other than Physicians & Surgeons	164	28
Lumber, Lumber Yards	161	29
Books/Gift Shops/Novelties & Toys	158	30
Furniture	155	31
Veterinarians	155	31
Fast Food	155	31
Oil, Gas & Other Utilities	146	34
Home Furnishings	144	35
Media/Publishing	135	36
Pharmacies	135	36
Professionals & Other Specialists	132	38
Tires/Tire Dealers	132	38
Automotive-Auto Renting & Leasing	129	40
Optometrists, Opticians, Eyeglasses	123	41
Printers, Copying, Screen Printing	120	42
Rentals - Other/Rental Stores	114	43
Recreation & Entertainment-Theatres/Movies	111	44
Records/Videotapes - Sales/Rentals	105	45
Travel Agents	102	46
Appliances - Major - Repair	102	46
Appliances - Major	99	48
Automotive-Service Stations - Gas & Oil	99	48
Electronic Products-Televisions, Radios, VCRs, etc.	99	48

ESTIMATE OF ANNUAL REFERENCES FOR SPECIFIC PRODUCTS & SERVICES (Cont'd)

Product/Service Category	Estimate of Annual References: Estimate (in millions)	Estimate of Annual References: Rank
Glass	99	48
Automotive-Auto Wrecking & Towing	96	52
Transportation-Taxis/Limousines	93	53
Clothing (Men's, Women's, Childrens)	93	53
Churches/Clergy	90	55
Office Furniture, Equipment & Supplies	87	56
Repair/Parts for Electronic Products Other than TV & Radio	87	56
Pet Shops, Supplies, Food	84	57
Industrial Equipment & Supplies	84	57
General Contractors	81	60
Electronic Products-Computers/Computer Dealers	81	60
Paint & Other Wallcoverings	81	60
Cleaners/Tailors	81	60
Carpeting & Other Floor Covering	78	64
Electronic Products-Repair/Parts for TV & Radio	75	65
Farm Equipment & Supplies	75	65
Photographic Equipment & Supplies	72	67
Landscape Contractors	69	68
Automotive-Auto Body Repairing & Painting	69	68
Machines, Motors & Engines	69	68
Lawn Maintenance	69	68
Carpet & Rug Cleaning	69	68
Locks, Locksmiths, Security Systems	66	73
Nurseries/Greenhouses	63	74
Social Service Organizations	63	74
Plastic, Rubber & Petroleum Related	60	76
Moving & Storage	60	76
Electric Contractors	54	78
Electrical Supplies & Equipment	51	79
Exterminators/Pest Control	51	79
Loans, Financing & Mortgages	51	79
Lawn & Garden Products Other than Lawn Mowers, Snow Blowers, Edgers & Power Tools	51	79
Air Conditioning Systems	45	83
Heating Systems	45	83
Shoes	45	83
Jewelers/Watches	42	86
Equipment & Supplies for Retail Business	39	87
Lawn & Garden Products-Lawn Mowers, Snowblowers, Edgers & Power Tools	39	87
Automotive-Transmissions	36	89
Photographers - Portrait	36	89
Transportation-Bus Lines	33	91
Photo Finishing & Processing	33	91
Roofing Contractors	33	91
Morticians, Funeral Directors	33	91
Recreational Vehicles-Motorcycles, Scooters	33	91
Plumbing Fixtures & Supplies	33	91
Automotive-Mufflers & Exhaust Systems	30	97
Automotive-Auto Accessories	27	98
Air Conditioning System Repairs	24	99
Nursing Homes	21	100
Electronic Products-Telephone Equipment & Systems	15	101
Transportation-Railroads	15	101
Heating System Repair	12	103
Recreational Vehicles-Campers, RVs, Snowmobiles	12	103
Air Conditioning Contractors	9	105
Heating Contractors	9	105
Electronic Products-Typewriters	3	107

SOURCE: Statistical Research, Inc.

URBAN/RURAL REPORT

The following report provides key findings from the 1988-89 National Yellow Pages Usage Study. Based on the two years of measurement (96 measurement weeks during January through December each year), a total of 21,715 interviews were conducted among a random sampling of persons age 18 and over residing in telephone households in the continental U.S. This report presents the findings in total and by urban versus rural areas.

98.3% of all adults indicated familiarity with the Yellow Pages, hence awareness of the Yellow Pages is almost universal. This holds true for consumers in both urban and rural areas.

A Counties	B Counties	C Counties	D Counties
98.5%	98.7%	98.5%	97.1%

90.2% of all adults make at least one reference in the Yellow Pages in the course of a year. This varies by county size as follows:

A Counties	B Counties	C Counties	D Counties
91.3%	92.0%	90.5%	83.7%

77.2% of all adults referred to the Yellow Pages in the typical month in this two year period. Average monthly usage is notably higher in B county areas.

A Counties	B Counties	C Counties	D Counties
78.3%	81.6%	77.4%	66.2%

58.1% of all adults in the U.S. referred to the Yellow Pages during the average week in this two year period. Average weekly usage is notably higher in B county areas.

A Counties	B Counties	C Counties	D Counties
58.0%	63.5%	59.5%	46.4%

1.91 references to the Yellow Pages are made by all U.S. adult consumers in the average week. This varies by county size as follows:

A Counties	B Counties	C Counties	D Counties
1.89	2.22	1.94	1.30

17.4 billion is the estimate of the number of references adult consumers made in the Yellow Pages in 1989. This distributes by county size as follows:

	A Counties (000,000)	B Counties (000,000)	C Counties (000,000)	D Counties (000,000)
Estimate of usage	7,134	6,073	2,645	1,548
Share of usage	41.0%	34.9%	15.2%	8.9%
Share of population	41.6%	30.2%	15.1%	13.1%
User Index*	99	116	101	68

* Index = Share of usage ÷ Share of population.

URBAN/RURAL REPORT (Cont'd)

On the typical Yellow Pages reference .....

53.3% referred to at least one Yellow Pages advertisement. This held true in both urban and rural areas.

A Counties	B Counties	C Counties	D Counties
52.2%	54.0%	54.6%	46.9%

40.0 billion is the estimate of the number of ad exposures that occurred in 1989 as a result of these references. This distributes by county size as follows:

	A Counties (000,000)	B Counties (000,000)	C Counties (000,000)	D Counties (000,000)
# ad exposures	17,090	14,550	5,590	2,790
Share of exposures	42.7%	36.3%	14.0%	7.0%
Share of population	41.6%	30.2%	15.1%	13.1%
User Index*	103	120	93	53

36.7% did not have the name of a store, firm or establishment in mind prior to looking in the Yellow Pages. This was notably higher in A county areas.

A Counties	B Counties	C Counties	D Counties
40.8%	34.3%	33.3%	32.3%

73.0% of these references were for personal reasons and 28.4% were job related or were for business reasons. This holds true in both urban and rural areas.

	A Counties	B Counties	C Counties	D Counties
Personal	73.0%	74.8%	73.0%	72.4%
Business	27.0%	25.2%	27.0%	27.6%

83.4% of all Yellow Pages references resulted in a contact with a store or business. This holds true for both urban and rural consumers.

A Counties	B Counties	C Counties	D Counties
83.4%	84.1%	84.6%	81.1%

47.8% of these Yellow Pages references resulted in the purchase of a product or service. The purchase rate by county size is as follows:

A Counties	B Counties	C Counties	D Counties
49.6%	46.9%	49.0%	44.2%

88.1% either had already made the purchase or indicated they were likely to do so. This was substantially similar by county size.

A Counties	B Counties	C Counties	D Counties
87.5%	88.7%	88.6%	87.2%

* Index = Share of exposures — Share of population.

ESTIMATE OF ANNUAL YELLOW PAGES REFERENCES

BY COUNTY SIZE FOR SPECIFIC PRODUCTS AND SERVICES

Total U.S. Rank	Product/Service	Total U.S. Estimate (millions)	A Counties Rank	A Counties Estimate (millions)	B Counties Rank	B Counties Estimate (millions)	C&D Counties Rank	C&D Counties Estimate (millions)
1	Physicians/Surgeons	1,100	2	324	1	418	1	358
2	Restaurants	871	1	438	3	243	3	190
3	Auto Parts	828	3	251	2	275	2	302
4	Pizza	532	4	248	6	136	5	148
5	Auto Repair/Service	514	5	168	4	202	6	144
6	Auto Dealers	434	13	108	5	149	4	177
7	Insurance	353	7	133	8	101	7	119
8	Government	317	19	99	7	108	8	110
9	Hospitals	311	8	130	9	92	11	89
10	Grocers/Supermarkets	290	9	122	10	90	14	78
11	Building Materials	275	6	136	20	66	18	73
12	Attorneys/Lawyers	272	20	84	11	87	9	101
13	Beauty Salons	263	16	101	15	75	13	87
14	Department Stores	254	14	104	16	73	15	77
15	Recreation	242	11	107	12	84	29	51
16	Banks	239	11	107	12	84	19	48
17	Schools	236	20	84	22	63	11	89
18	Contractors	230	27	73	23	60	10	97
18	Plumbing Contractors	230	14	104	27	51	16	75
20	Airlines	224	10	121	18	68	38	35
21	Real Estate	215	23	80	20	66	20	69
22	Dentists	197	41	53	17	72	19	72
22	Hardware Stores	197	32	63	23	60	17	74
24	Hotels/Motels	188	22	83	30	48	25	57
25	Hobbies & Crafts	185	16	101	30	48	38	36
25	Sporting Goods	185	25	74	25	57	27	54

County Size Definitions

A. All counties belonging to the top 25 largest SMSAs or SCSAs
B. All counties not included in A that are either over 150,000 in population or in SMSAs or SCSAs with over 150,000 in population
C. All counties not included in A or B that are either over 40,000 in population or in SMSAs with over 40,000 in population
D. All remaining counties

SOURCE: STATISTICAL RESEARCH, INC.

See Appendix "A" for a description of sampling and survey procedures, sampling error estimates and other qualifications.

CENSUS REGION REPORT

The following report provides key findings from the 1988-89 National Yellow Pages Usage Study. Based on the two years of measurement (96 measurement weeks during January through December each year), a total of 21,715 interviews were conducted among a random sampling of persons age 18 and over residing in telephone households in the continental U.S. This report presents the findings in total and by census region.

98.3% of all adults indicated familiarity with the Yellow Pages, hence awareness of the Yellow Pages is almost universal. This holds true for consumers in all census regions.

Northeast	Midwest	South	West
98.6%	98.6%	98.0%	98.3%

90.2% of all adults make at least one reference in the Yellow Pages in the course of a year. This value by census region is as follows:

Northeast	Midwest	South	West
90.0%	90.9%	88.5%	92.3%

77.2% of all adults referred to the Yellow Pages in the typical month. Average monthly usage is notably higher in the West census region.

Northeast	Midwest	South	West
75.2%	79.4%	74.4%	81.0%

58.1% of all adults in the U.S. referred to the Yellow Pages during the average week in this two year period. Average weekly usage is notably higher in the West census region.

Northeast	Midwest	South	West
54.1%	59.7%	57.0%	61.9%

1.91 references to the Yellow Pages are made by <u>all</u> U.S. adult consumers in the average week. This varies by census region as follows:

Northeast	Midwest	South	West
1.59	1.92	1.94	2.15

17.4 billion is the estimate of the number of references adult consumers made in the Yellow Pages in 1989. This distributes by census region as follows:

	Northeast (000,000)	Midwest (000,000)	South (000,000)	West (000,000)
Estimate of usage	3,115	4,350	6,090	3,845
Share of usage	17.9%	25.0%	35.0%	22.1%
Share of population	21.4%	24.8%	34.2%	19.6%
User Index*	84	101	102	113

* Index = Share of usage ÷ Share of population.

CENSUS REGION REPORT (Cont'd)

On the typical Yellow Pages reference .....

53.3% referred to at least one Yellow Pages advertisement. This holds true across all census regions.

Northeast	Midwest	South	West
53.1%	49.7%	49.3%	55.6%

40.0 billion is the estimate of the number of ad exposures that occurred in 1989 as a result of these references. This distributes by census region as follows:

	Northeast (000,000)	Midwest (000,000)	South (000,000)	West (000,000)
# ad exposures	8,030	9,520	12,760	9,710
Share of exposures	20.0%	23.8%	31.9%	24.3%
Share of population	21.4%	24.8%	34.2%	19.6%
User Index*	94	96	93	124

36.7% did not have the name of a store, firm or establishment in mind prior to looking in the Yellow Pages. This varies by census region as follows:

Northeast	Midwest	South	West
42.0%	31.2%	34.4%	42.9%

73.0% of these references were for personal reasons and 26.7% were job related or were for business reasons. These proportions by census region are as follows:

	Northeast	Midwest	South	West
Personal	74.5%	72.5%	73.0%	73.8%
Business	25.5%	27.5%	27.0%	26.2%

83.4% of all Yellow Pages references resulted in a contact with a store or business. This holds true for consumers in all census regions.

Northeast	Midwest	South	West
81.4%	82.9%	85.6%	83.3%

47.8% of these Yellow Pages references resulted in the purchase of a product or service. The purchase rate by census region is as follows:

Northeast	Midwest	South	West
49.3%	48.6%	46.6%	49.0%

88.1% either had already made the purchase or indicated they were likely to do so. This was substantially similar by census region.

Northeast	Midwest	South	West
87.7%	87.9%	88.4%	88.6%

* Index = Share of exposures ÷ Share of population.

CENSUS REGION REPORT (Cont'd)

ESTIMATE OF ANNUAL YELLOW PAGES REFERENCES
BY CENSUS REGION FOR SPECIFIC PRODUCTS AND SERVICES

Total U.S. Rank	Product/Service	Total U.S. Estimate (millions)	Northeast Rank	Northeast Estimate (millions)	Midwest Rank	Midwest Estimate (millions)	South Rank	South Estimate (millions)	West Rank	West Estimate (millions)
1	Physicians/Surgeons	1,100	1	180	1	323	1	414	2	183
2	Restaurants	871	2	169	2	218	3	263	1	221
3	Auto Parts	828	6	74	3	215	2	363	3	176
4	Pizza	532	4	84	4	198	7	127	5	123
5	Auto Repair/Service	514	3	93	6	110	4	171	4	140
6	Auto Dealers	434	5	83	5	108	6	140	6	103
7	Insurance	353	8	59	9	96	5	148	16	50
8	Government	317	11	52	9	96	8	121	17	48
9	Hospitals	311	15	42	7	104	9	114	13	51
10	Grocers/Supermarkets	290	7	63	12	77	11	108	22	42
11	Building Materials	275	11	51	19	66	13	92	9	66
12	Attorneys/Lawyers	272	11	51	12	77	14	90	12	54
13	Beauty Salons	263	14	45	8	98	19	75	19	45
14	Department Stores	254	33	24	12	77	9	114	26	39
15	Recreation	242	15	42	22	56	17	84	11	60
16	Banks	239	21	36	20	63	15	89	13	51
17	Schools	236	25	33	18	74	12	99	36	30
18	Contractors	230	11	51	26	50	24	66	10	63
18	Plumbing Contractors	230	9	54	12	77	29	54	19	45
20	Airlines	224	21	36	29	44	20	74	7	70
21	Real Estate	215	15	42	11	83	22	72	53	18
22	Dentists	197	23	35	17	75	26	55	32	32
22	Hardware Stores	197	27	30	29	45	16	86	29	36
24	Hotels/Motels	188	49	15	25	51	23	71	13	51
25	Hobbies & Crafts	185	33	24	12	77	38	42	22	42
25	Sporting Goods	185	31	28	72	15	20	74	8	68

Census Region Definitions

Northeast: New York, Maine, Vermont, New Hampshire, Massachusetts, Connecticut, Rhode Island Pennsylvania and New Jersey

Midwest: Michigan, Ohio, Indiana, Illinois, Wisconsin, Iowa, Missouri, North Dakota, South Dakota, Minnesota, Nebraska and Kansas

South: Maryland, Delaware, D.C., Virginia, West Virginia, North Carolina, South Carolina, Georgia, Florida, Kentucky, Tennessee, Alabama, Mississippi, Arkansas, Louisiana, Oklahoma and Texas

West: Montana, Wyoming, Colorado, New Mexico, Idaho, Utah, Arizona, Washington, Oregon, Nevada and California

SOURCE: STATISTICAL RESEARCH, INC.

See Appendix "A" for a description of sampling and survey procedures, sampling error estimates